

## 11a Letters of Intent for the PI

Chapter 11a, Letters of Intent (LOI)s for the Principal Investigator (PI), is to be used by a PI only. SPOs should use Chapter 11b.

The LOI provides a snapshot and concise summary about the goals of a forthcoming proposal project by the PI in response to a solicitation from NSF. The following conditions apply for LOIs:

1. Program Solicitations vary in their LOI requirements. Regardless of the distinctions in LOI requirements, they are all successfully managed in FastLane. Distinctions in program solicitations include:
  - a. Program solicitations may allow PIs to directly submit an LOI.
  - b. Program solicitations may allow SPOs to create an LOI.
  - c. Program solicitations may mandate LOIs requiring SPO approval.
2. More than one LOI can be created for a single program solicitation.
3. The PI will be able to create a second LOI for a single solicitation, even if that particular solicitation allows for only one LOI to be submitted per PI. However, a permissive warning message will appear and inform the PI that he/she has already submitted a LOI for that particular solicitation.
4. LOIs cannot be created for program descriptions.

### Access the LOI Module

To access the LOI Module, complete the following steps:

1. Login to FastLane and click **Proposal Functions**.
2. The *What Do You Want to Work On Page* (Figure 1) will appear.

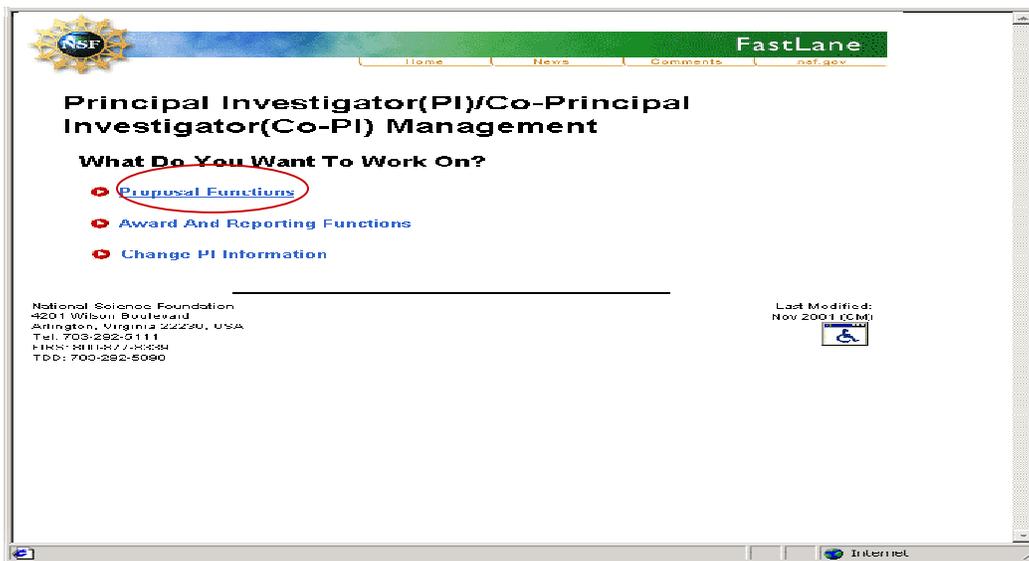


Figure 1. What Do You Want to Work On Page

3. Click **Proposal Functions** (circled in Figure 1).
4. The *Proposal Functions Page* (Figure 2) will appear.

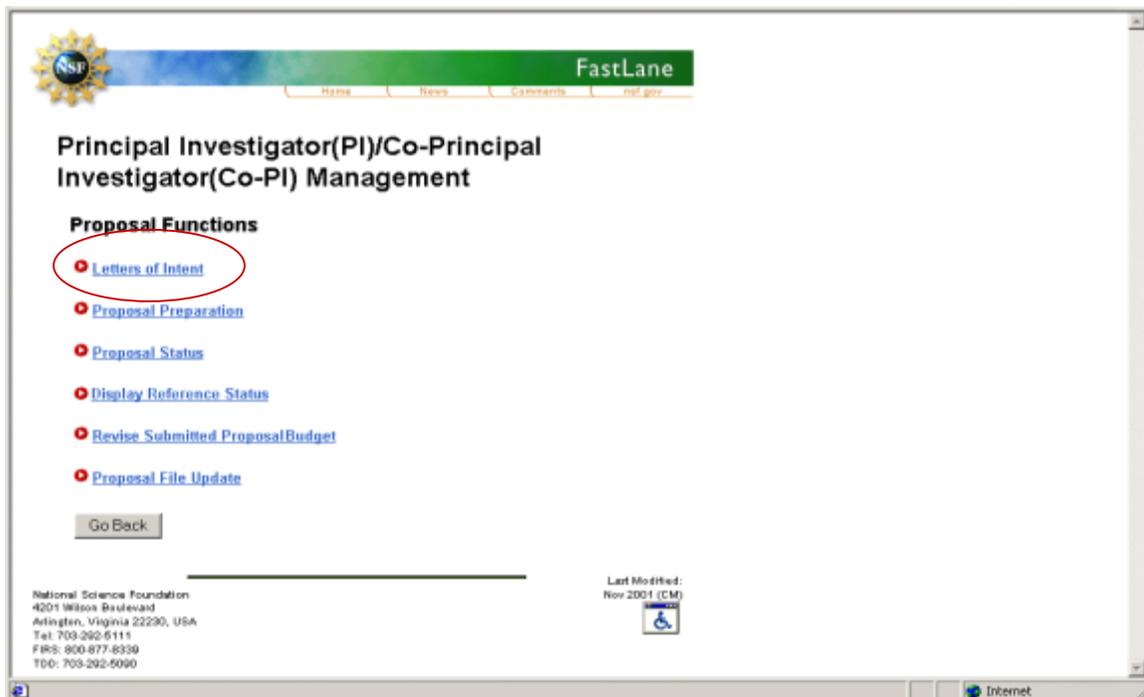


Figure 2. Proposal Functions Page

5. Click on **Letters of Intent** (circled in Figure 2).

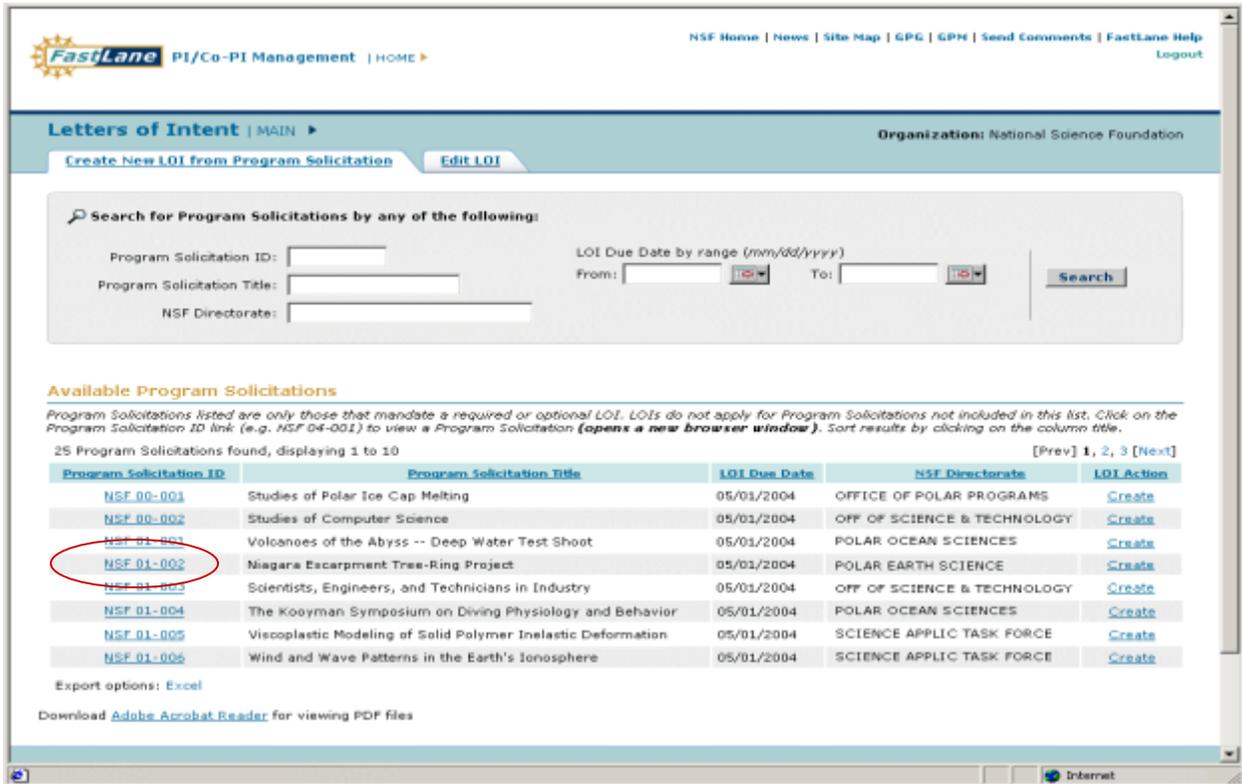


Figure 3. Create New LOI from Program Solicitation Tab Page

6. The *Create New LOI from Program Solicitation Tab Page* (Figure 3) will appear. The PI can search for particular solicitations by the following:

- Program Solicitation ID
- Program Solicitation Title
- NSF Directorate
- LOI Due Date by range (mm/dd/yyyy)

Available Program Solicitations appear and can be sorted by the following:

- Program Solicitation ID
- Program Solicitation Title
- LOI Due Date
- NSF Directorate

7. Click on a Program Solicitation ID (circled in Figure 3) to view a particular program solicitation. Close the pop-up window once finished viewing the solicitation to return to the Program Solicitation List.

8. The PI will have the following options:
  - a) Create a New LOI
  - b) Work on a Previously Saved LOI

## Create a New LOI

1. From the *Create New LOI from Program Solicitation Tab Page* (Figure 3), click **Create** in the LOI Action column to create a new LOI for the chosen Program Solicitation.
2. The *Create LOI Page* will appear (top of page - Figure 4, bottom of page - Figure 5).  
Note: The three questions at the bottom of Figure 4 are dynamic text fields related to a particular solicitation. The contexts of these questions vary depending on the solicitation. When creating a LOI, the PI may see none or up to three questions.

The screenshot shows the 'Create LOI' page in the FastLane system. The page header includes the FastLane logo and navigation links. The main content area is titled 'Letters of Intent' and contains a 'Create New LOI from Program Solicitation' tab. The page is for the National Science Foundation. The 'Program Solicitation Information' section displays: LOI Due Date: 02/01/2004, Program Solicitation ID: NSF 00-001, and Program Solicitation Title: Studies of Polar Icecap Melting. The 'Project Information' section includes: \* Project Title (text field), \* Synopsis (max 2500 chars) (text area), Other comments (max 2500 chars) (text area), Organizational Attribute (dropdown menu), Is this project part of a Homeland Defense Initiative? (max 50 chars) (text field), What is the position title of the POC for this LOI at their respective organization? (max 50 chars) (text field), and If the POC is at a university, what is their area of study? (max 50 chars) (text field).

Figure 4. Create LOI Page (top)

The screenshot displays a web form titled "Point of Contact for NSF Inquiries:". It features two radio button options: "Use this (user) name as point of contact" (selected) and "Use this (alternate) name as point of contact". The first option is pre-filled with: First Name: Jane, Middle Initial: J., Last Name: Doe, Telephone Number: 703-555-1212, Email Address: jdoe@nsf.gov, and Department: DIS. The second option has empty input fields for First Name, Middle Initial, Last Name, Telephone Number, Email Address, and Department.

Below this is the "Project PI:" section with input fields for First Name, Middle Initial, Last Name, and Organization Name.

The "Cross Directorate/Multi-disciplinary LOI:" section contains three dropdown menus for Primary, Secondary, and Tertiary Divisions, each with a "Please Select..." prompt.

Two columns follow: "Other Senior Project Personnel:" and "Participating Organizations:". Each has a light blue header bar, a text input field, and a "(Click 'Add Personnel' below)" or "(Click 'Add Organization' below)" instruction. Below each column is an "Add/Edit Personnel" or "Add Organization" button and a note: "(Min of 1 required for this LOI, Max of 4)". The "Add/Edit Personnel" button is circled in red.

At the bottom are "Cancel", "Save", and "Forward to SPD" buttons. The footer includes the National Science Foundation logo, address (4201 Wilson Boulevard, Arlington, Virginia 22230, USA), phone numbers, and a "Privacy and Security" link.

Figure 5. Create LOI Page (bottom)

3. Enter in Project Title (required), Synopsis (required), and Other Comments (optional).
4. Select an Organizational Attribute (optional) from the drop-down menu.
5. Enter in responses to the questions in the appropriate boxes (if applicable). Note: These questions derive from the PO and are customized for the solicitation. There may be zero to three of these questions.
6. Select the NSF Point of Contact. You can use the logged-in name as a contact or an alternate. If alternate is selected, enter in his/her First Name, Middle Initial, Last Name, Telephone Number, E-Mail Address, and Department. The NSF Point of Contact can also be the PI.

7. Enter Project PI First Name, Middle Initial, Last Name, and Organization Name (required). The Project PI may also be the same person as the NSF Point of Contact.
8. Select Primary, Secondary, or Tertiary Directorate/Divisions from the provided drop-down lists (if applicable). Note: These fields will only appear if the solicitation is a cross-directorate or encompasses multiple disciplines.
9. Click on **Add/Edit Personnel** (circled in Figure 5) in the Other Senior Project Personnel section of the page to add project personnel.
10. The *Other Senior Project Personnel Page* will appear (Figure 6).

Letters of Intent | MAIN ▶ Organization: National Science Foundation

Create New LOI from Program Solicitation Edit LOI

Create LOI - Add Other Senior Project Personnel  
Required fields are preceded by an asterisk(\*)

LOI ID: LB493943  
Program Solicitation ID: [NSF 02-428](#)  
Program Solicitation Title: Studies of Polar Icecap Melting

Other Senior Project Personnel:

[FastLane Personnel Search](#) (Adds personnel from the FastLane user tables)

\* First Name:   
Middle Initial:   
\* Last Name:   
\* Organization Name:   
\* Department:   
\* City:   
\* State:   
\* Country:

[Return to Form](#)   
(Min of 1 required for this LOI, Max of 4)

If you have added new personnel above, click "Add to List" before editing or deleting existing personnel below.  
Data entered above will not be saved until "Add to List" is pressed.

Personnel Name	Action
Doe, John	<a href="#">Edit</a>   <a href="#">Delete</a>
Miracle, Jane	<a href="#">Edit</a>   <a href="#">Delete</a>

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Privacy and Security

Internet

Figure 6. Other Senior Project Personnel Page

11. Enter in the following for Other Senior Project Personnel (as specified):
  - a) First Name
  - b) Middle Initial (optional)
  - c) Last Name
  - d) Organization Name

- e) Department
- f) City
- g) State
- h) Country

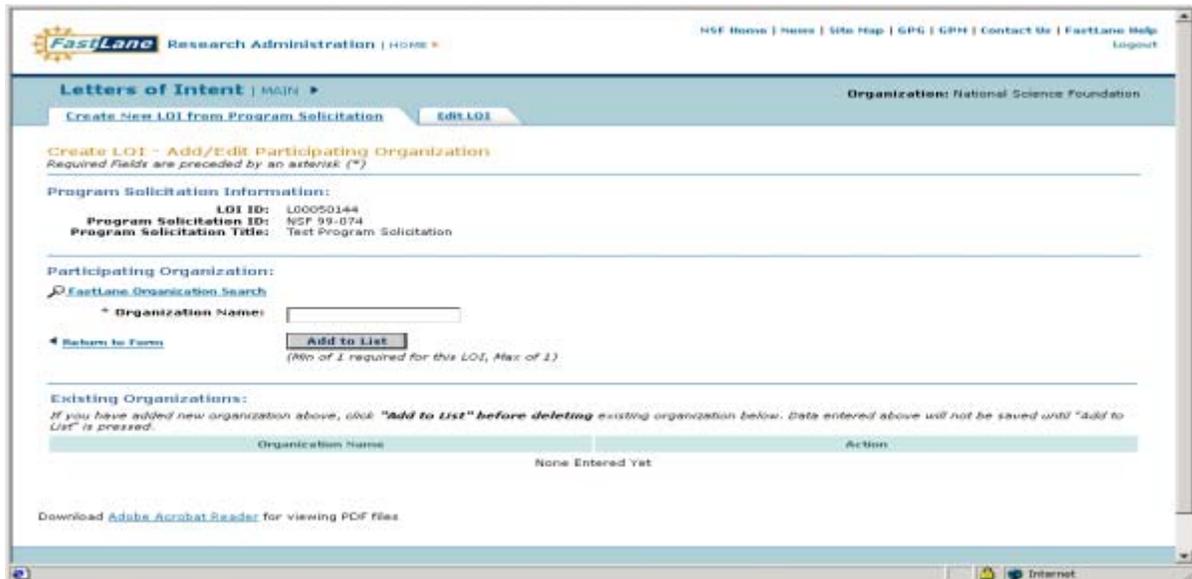
12. Click **Add to List** to add the person to Other Senior Project Person. Repeat Steps 9 through 11 if you are entering in more than one Other Senior Project Personnel.
13. Click **Edit** or **Delete** next to the added persons name (circled in Figure 6) if you wish to edit or delete a previously entered entry.
14. Click **Return to Form** to return to the *Updated Create LOI Page [bottom]* (Figure 7). The newly added project personnel will appear under the Other Senior Project Personnel list.

The screenshot displays a web form titled "Updated Create LOI Page [bottom]". At the top, there is a dropdown menu for "Tertiary Division:" with the text "Please Select...". Below this, the form is divided into two main sections: "Other Senior Project Personnel:" and "Participating Organizations:". The "Other Senior Project Personnel:" section contains a table with two rows: "Personnel Name", "John W Doe", and "Jane Miracle". Below the table is a button labeled "Add/Edit Personnel" and a note "(Min of 1 required for this LOI, Max of 4)". The "Participating Organizations:" section contains a text input field for "Organization Name" with the instruction "(Click 'Add Organization' below)". Below the input field is a button labeled "Add Organization" which is circled in red in the image, and a note "(Min of 1 required for this LOI, Max of 4)". At the bottom of the form are three buttons: "Cancel", "Save", and "Forward to SPD". The footer of the page includes the National Science Foundation logo and contact information: "4201 Wilson Boulevard, Arlington, Virginia 22230, USA", "Tel: 703-292-8111, FRS: 800-877-8339 | TDD: 703-292-5080", and a "Privacy and Security" link. The browser's address bar shows "Internet".

Figure 7. Updated Create LOI Page [bottom]

15. Click **Add Organization** (circled in Figure 7) in the Participating Organizations section of the *Updated Create LOI Page [bottom]* (Figure 7).

16. The *Add / Edit Participating Organization Page* will appear (Figure 8).



**Figure 8. Add/Edit Participating Organization Page**

17. Enter in the Organization Name in the text box and click **Add to List**. Go to Step 18.

Or

Click **FastLane Organization Search** Link. The *FastLane Organization Search Page* appears (Figure 9).

FastLane Research Administration | HOME

NSF Home | News | Site Map | GPG | GPM | Contact Us | FastLane Help  
Logout

Letters of Intent | MAIN

Organization: National Science Foundation

Create New LOI from Program Solicitation Edit LOI

FastLane Organization Search  
Required fields are preceded by an asterisk (\*):

\* Organization Name:   
(At least 3 letters)

Begins with  
 Ends with  
 Contains

Cancel Search Organization

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Figure 9. FastLane Organization Search Page

- a. Enter at least three letters of the organization you wish to locate and one radio button (begins with, ends with, or contains) to correspond within the organization.
- b. Click **Search Organization**.
- c. A *Search Results Page* will appear (Figure 10).

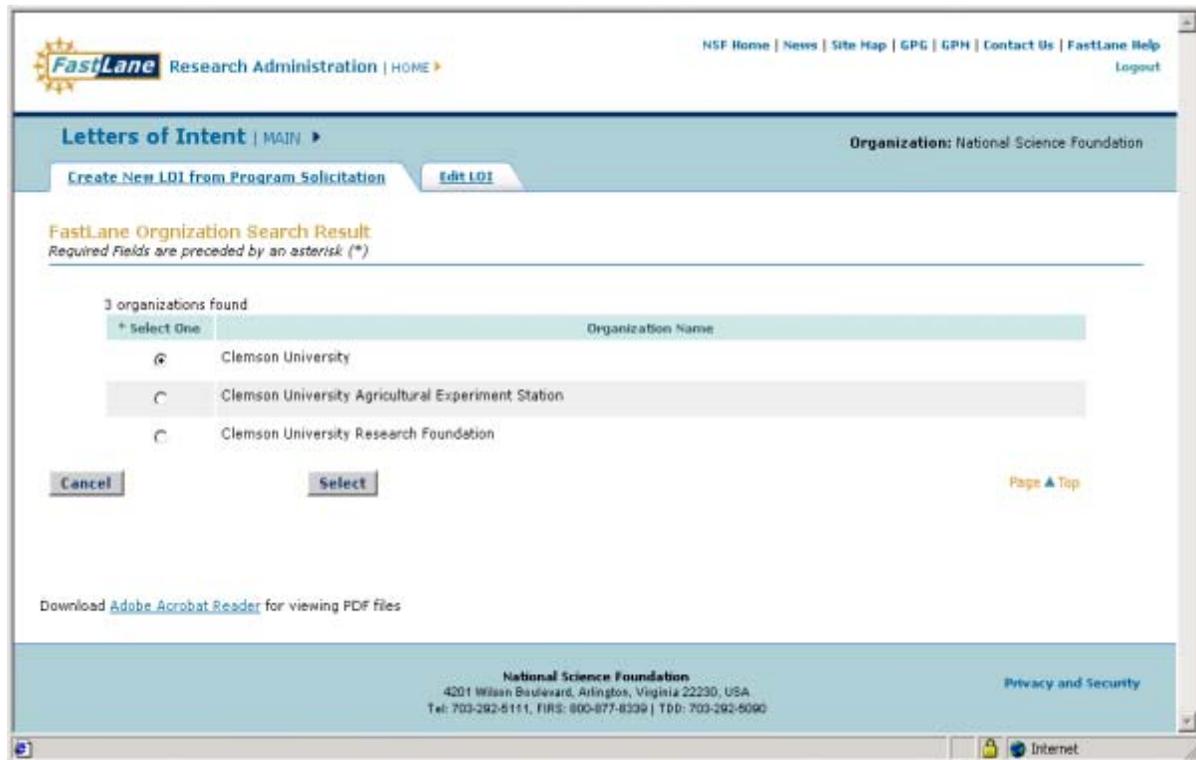


Figure 10. Search Results Page

- d. Click on the radio button of the organization that meets your search criteria and click on **Select**.
  - e. The Organization Name will appear in the text box on the *Add/Edit Participating Organizations Page* (Figure 8). Click **Add to List**.
18. The *Add/Edit Participating Organizations Page* will appear with the added organization displayed at the bottom of the page (Figure 11).

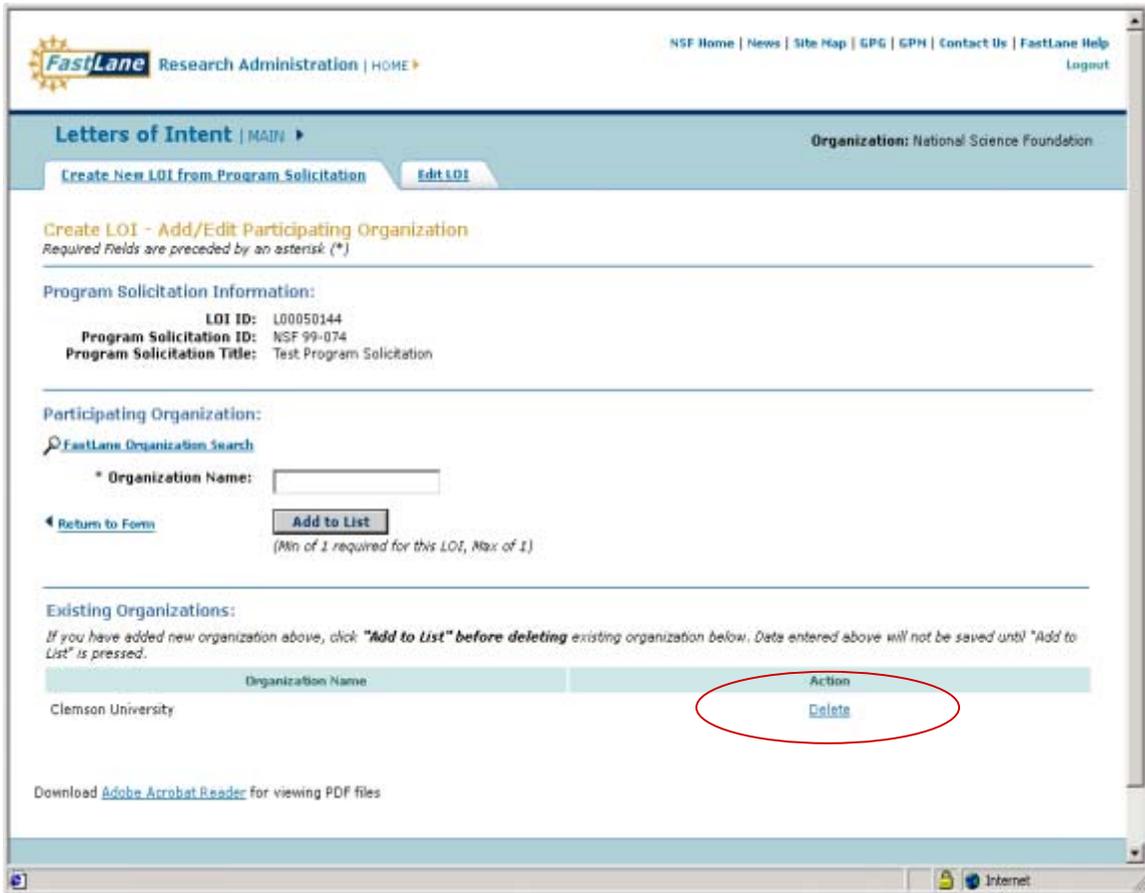


Figure 11. Add/Edit Participating Organizations Page

19. Click **Return to Form** link or repeat steps 15 through 18 to add additional Participating Organizations. To delete Participating Organizations, click **Delete** (circled in Figure 11).

20. The *Create LOI Page* (Figure 6) will appear. Click **Save** to retain all work. The *Edit LOI List Page* (Figure 13) will appear.

Or

Click **Cancel** to end the LOI creation or edit. The *Edit LOI List Page* (Figure 13) will appear.

Or

Click **Forward to SPO** to send the completed LOI to the SPO for review (applicable when the Program Solicitation requires that a PI forward the LOI to a SPO). Go to Forward a LOI Section on Page 11a-12 of the User Guide.

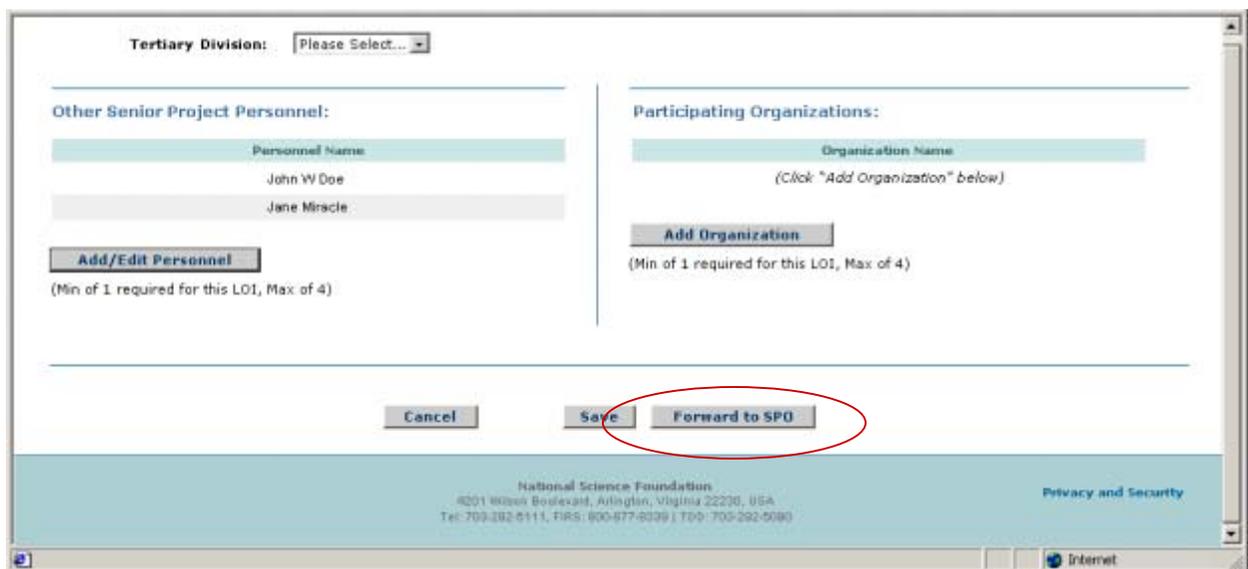
Or

Click **Submit** to submit the LOI to NSF. Go to Submit a LOI Section on Page 11a-15 of the User Guide.

## Forward a LOI to SPO

When designated in the Program Solicitation, PIs must forward the completed LOI to the SPO for review. Complete the following steps to forward an LOI:

1. Click **Forward to SPO** (circled in Figure 12) on the *Create LOI Page* (or *Edit LOI Page* when a working with a previously saved LOI).



The screenshot displays a web form titled "Create LOI Page". At the top, there is a dropdown menu for "Tertiary Division" with the text "Please Select...". Below this, the form is divided into two main sections. The left section, "Other Senior Project Personnel:", contains a table with two rows: "Personnel Name" with values "John W Doe" and "Jane Miracle". Below the table is a button labeled "Add/Edit Personnel" and a note "(Min of 1 required for this LOI, Max of 4)". The right section, "Participating Organizations:", contains a text input field for "Organization Name" with a placeholder "(Click 'Add Organization' below)". Below this is a button labeled "Add Organization" and a note "(Min of 1 required for this LOI, Max of 4)". At the bottom of the form, there are three buttons: "Cancel", "Save", and "Forward to SPO". The "Forward to SPO" button is circled in red. The footer of the page includes the National Science Foundation logo and contact information: "4201 Wilson Boulevard, Arlington, Virginia 22230, USA", "Tel: 703-292-8111, FRS: 800-677-6339 | TDD: 703-292-5080", and a "Privacy and Security" link. The browser's address bar shows "Internet".

Figure 12. Create LOI Page

Or

Click **Forward** (circled in Figure 13) (applicable only when working with a previously saved LOI) on the *LOI List Page*.

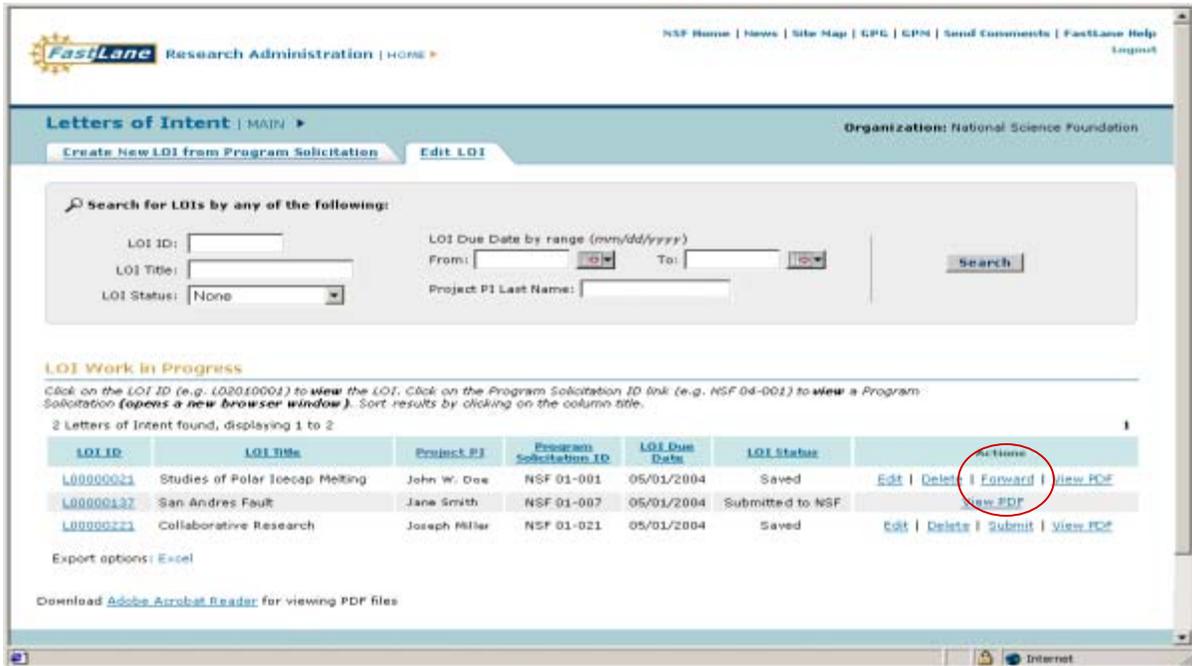


Figure 13. Edit LOI List Page

2. A *Forward Are You Sure Page* will appear (Figure 14) and ask if you are about your decision. Click **Forward** to forward the LOI or **Cancel** to return to the *Edit LOI Page* (Figure 13).

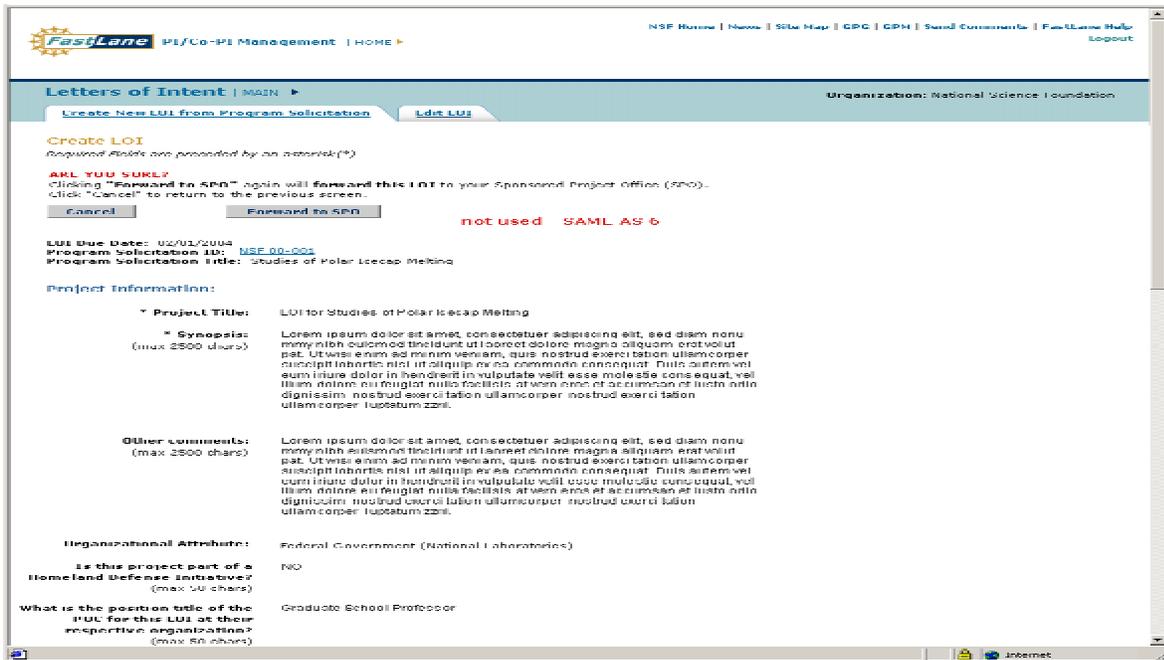


Figure 14. Submit Are You Sure Page

3. A *Forward Confirmation Page* (Figure 15) will appear. Click **Create New LOI from Program Solicitation List Page** to return to the *Create New LOI from Program Solicitation List Page* or **Edit LOI List Page** to return to the *Edit LOI List Page*.

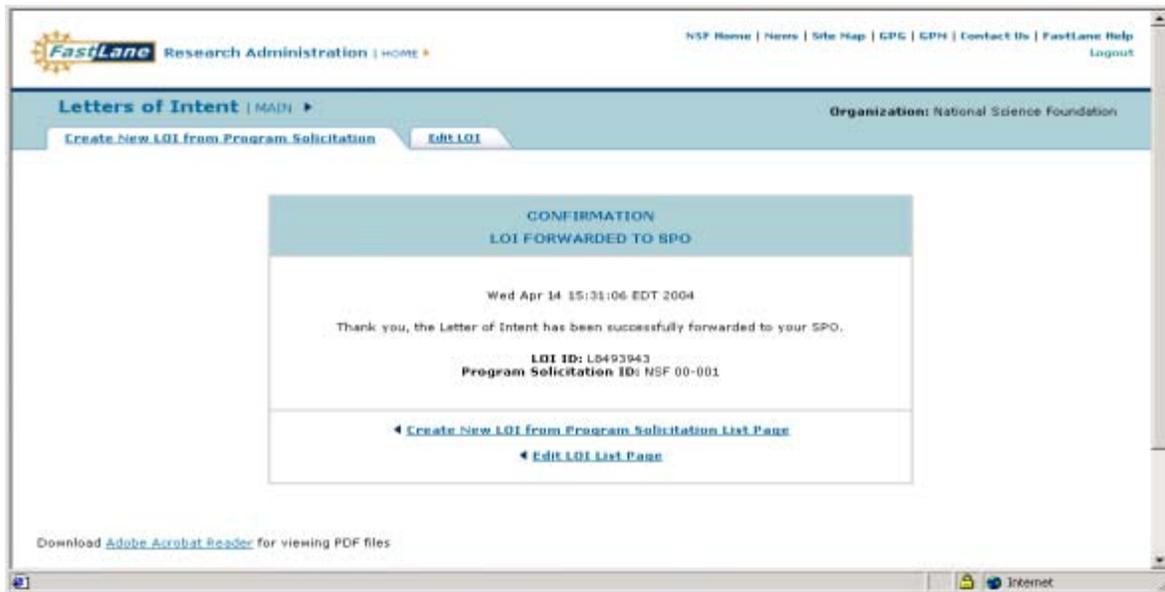


Figure 15. Forward Confirmation Page

## Submit a LOI

PIs can submit a LOI they have created themselves only when the Program Solicitation allows for a PI to submit the LOI directly to NSF. Complete the following steps to submit an LOI:

1. Click **Submit to NSF** (circled in Figure 16) on the *Create LOI Page* (or *Edit LOI Page* when working with a previously saved LOI).

Tertiary Division:

---

**Other Senior Project Personnel:**

Personnel Name
John W Doe
Jane Miracle

(Min of 1 required for this LOI, Max of 4)

**Participating Organizations:**

(Click "Add Organization" below)

(Min of 1 required for this LOI, Max of 4)

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Internet

Figure 16. Create LOI Page

Or

Click **Submit** on the *Edit LOI List Page* (circled in Figure 17) when working with a previously saved LOI.

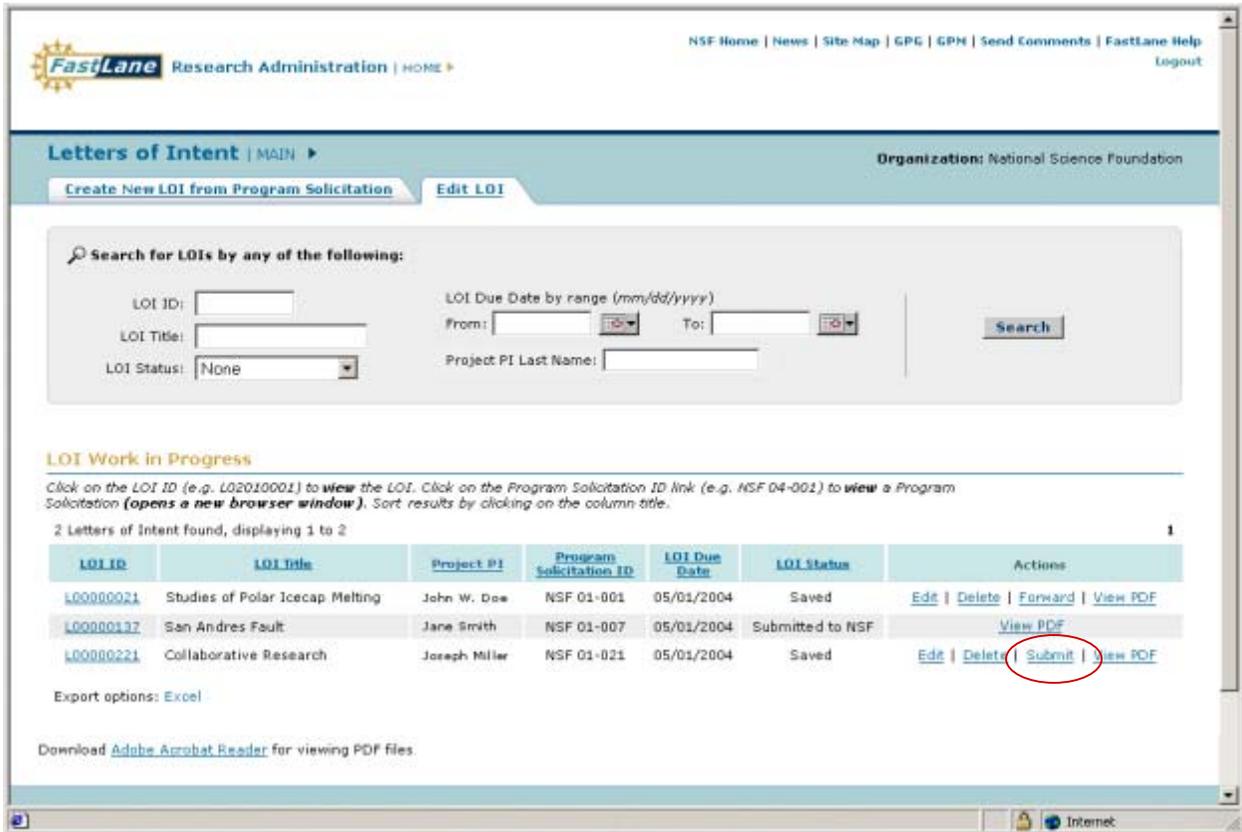


Figure 17. Edit LOI List Page

2. A *Submit Are You Sure Page* will appear (Figure 18) and ask if you are about your decision. Click **Submit** to submit the LOI or **Cancel** to return to the *Edit LOI Page* (Figure 17).

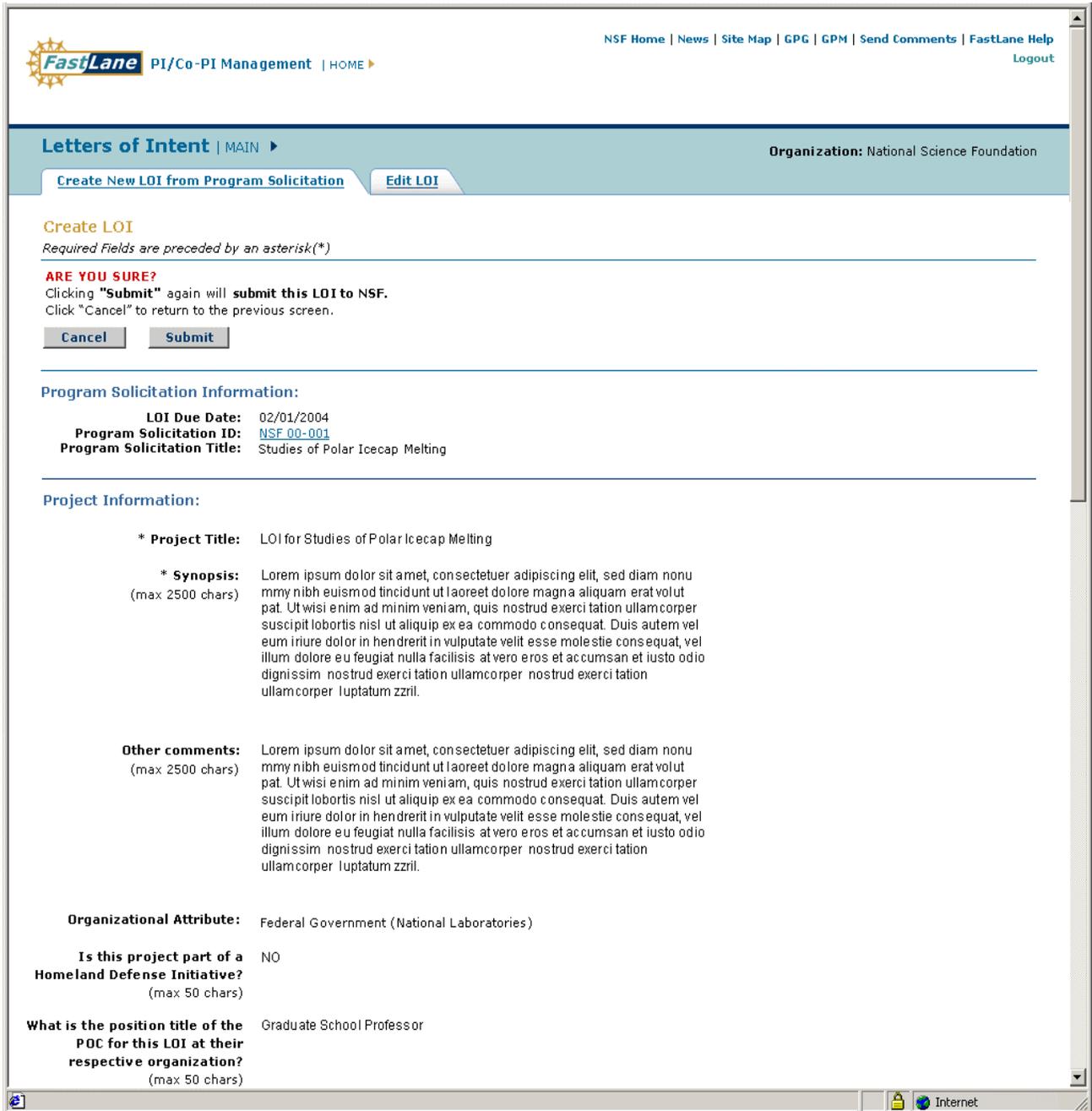


Figure 18. Submit Are Your Sure Page

3. A *Submit Confirmation Page* (Figure 19) will appear. Click **Create New LOI from Program Solicitation List Page** to return to the *Create New LOI from Program Solicitation List Page* or **Edit LOI List Page** to return to the *Edit LOI List Page*.

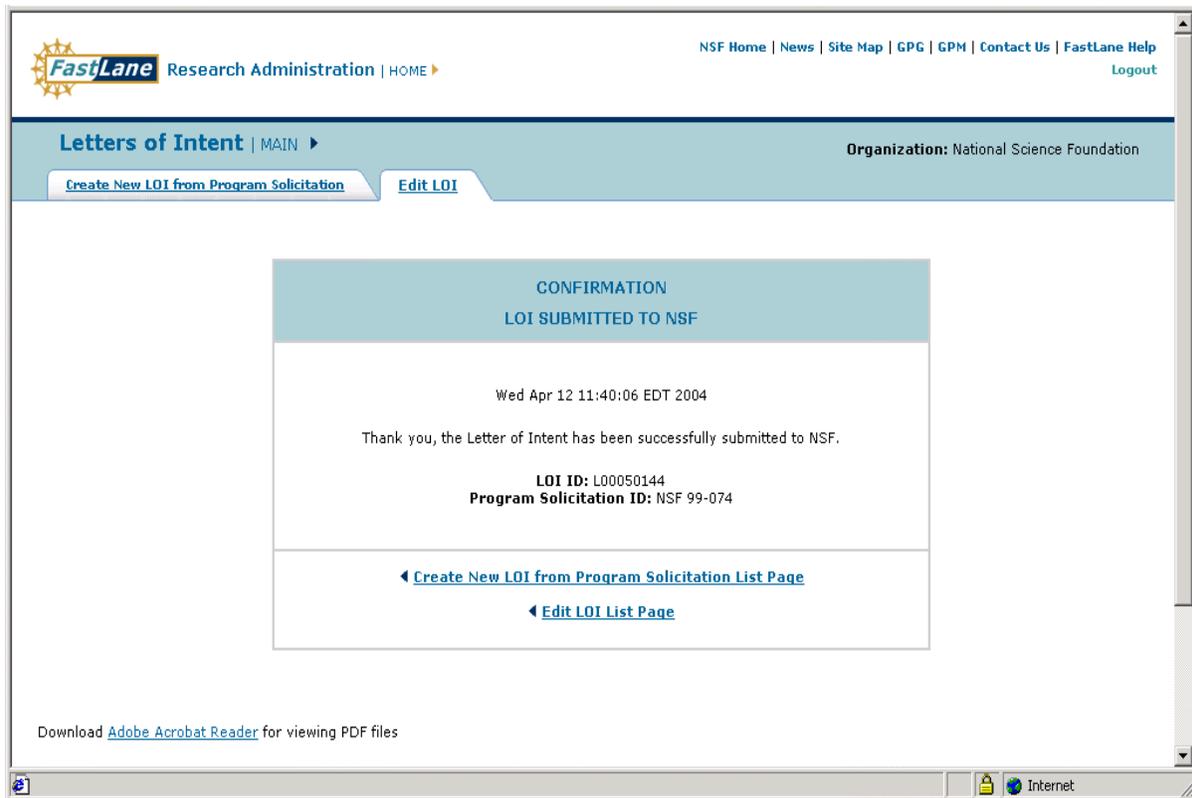


Figure 19. Submit Confirmation Page

## Work on a Previously Saved LOI

PIs can work on a previously saved LOI. Complete the following actions:

1. From the *Create New LOI from Program Solicitation Page* (Figure 20), click on the **Edit LOI** Tab (circled in Figure 20).

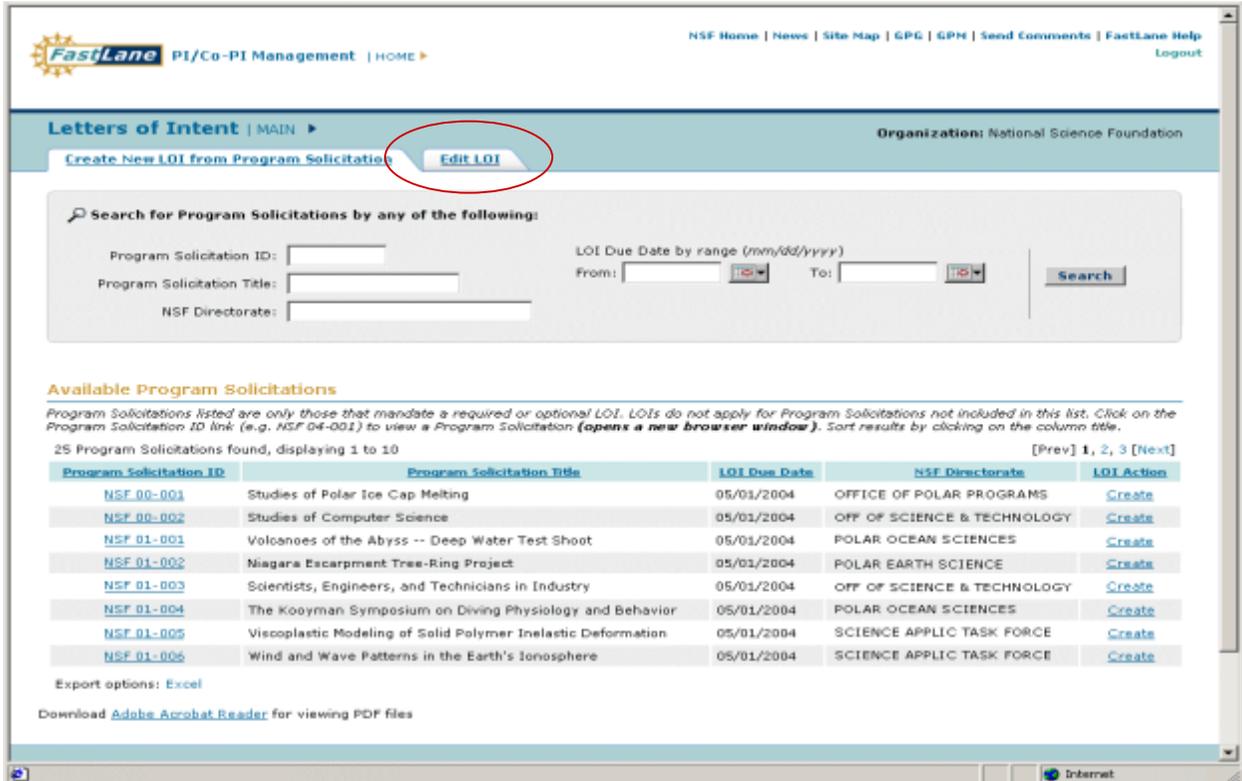


Figure 10. Create New LOI from Program Solicitation Page

2. The *Edit LOI List Page* will appear (Figure 21).

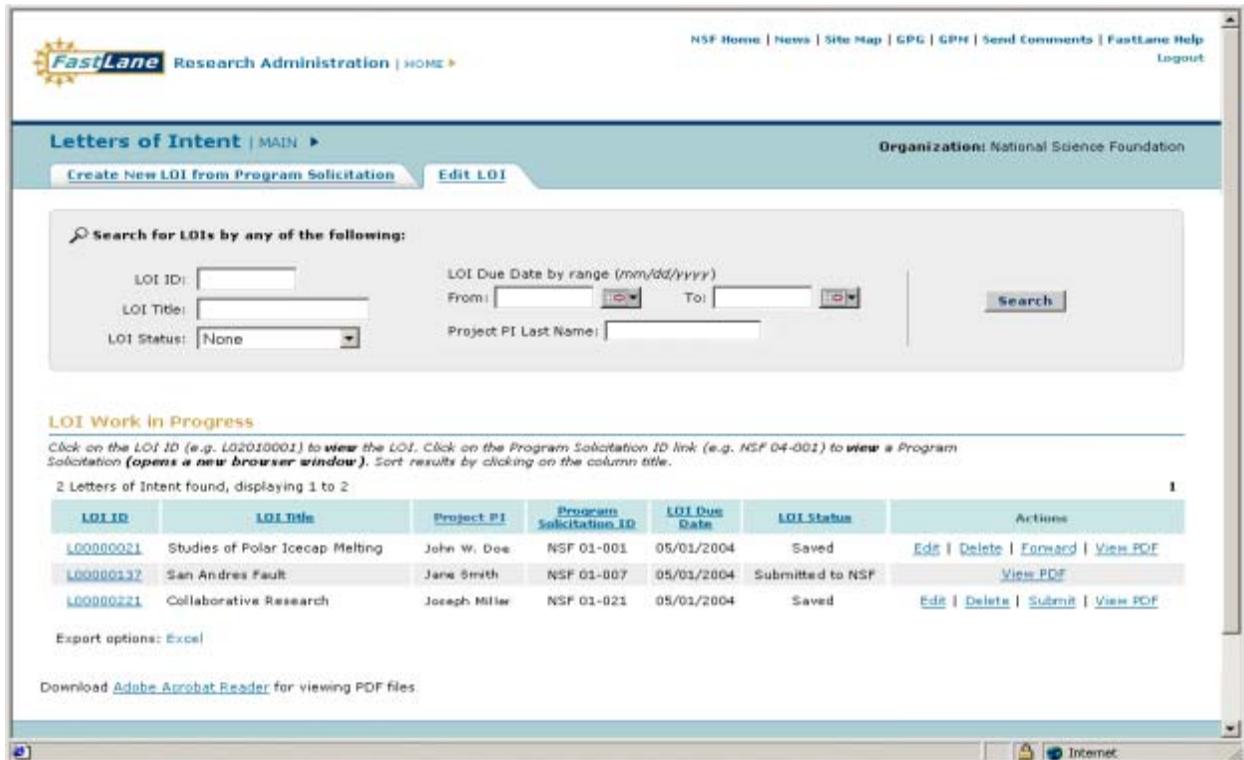


Figure 21. Edit LOI List Page

3. The PI can search for a particular LOI by the following:

- LOI ID
- LOI Title
- LOI Status
- LOI Due Date by range (mm/dd/yyyy)
- Project PI Name

4. LOIs will appear and can be sorted by the following:

- LOI ID
- LOI Title
- LOI Due Date
- Project PI
- LOI Status (Forwarded, Submitted, Saved)

5. The PI may have the following options:

- View a LOI.
- Delete a LOI

- c) Edit a LOI.
- d) Forward a LOI. (Go to the Forward to SPO section on Page 11a-12 of the User Guide)
- e) Submit a LOI. (Go to the Submit a LOI section on Page 11a-15 of the User Guide)

## View a LOI

PIs can view all LOIs they created, regardless of the LOI status.

1. To view a PDF version of a LOI, click on View PDF link of an LOI you wish to view (circled in Figure 22).

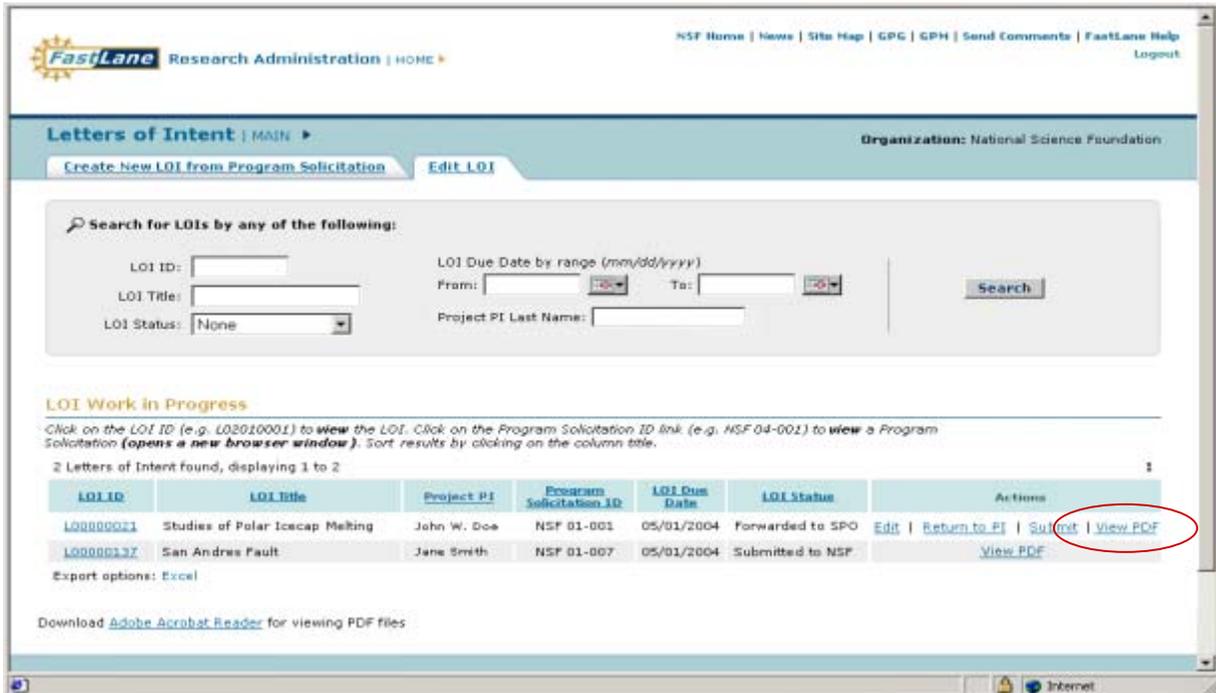


Figure 22. Edit LOI List Page

2. A PDF version of the LOI will appear (Figure 23). Close out the Adobe Acrobat Program on your browser to return to the *Edit LOI List Page* (Figure 22).

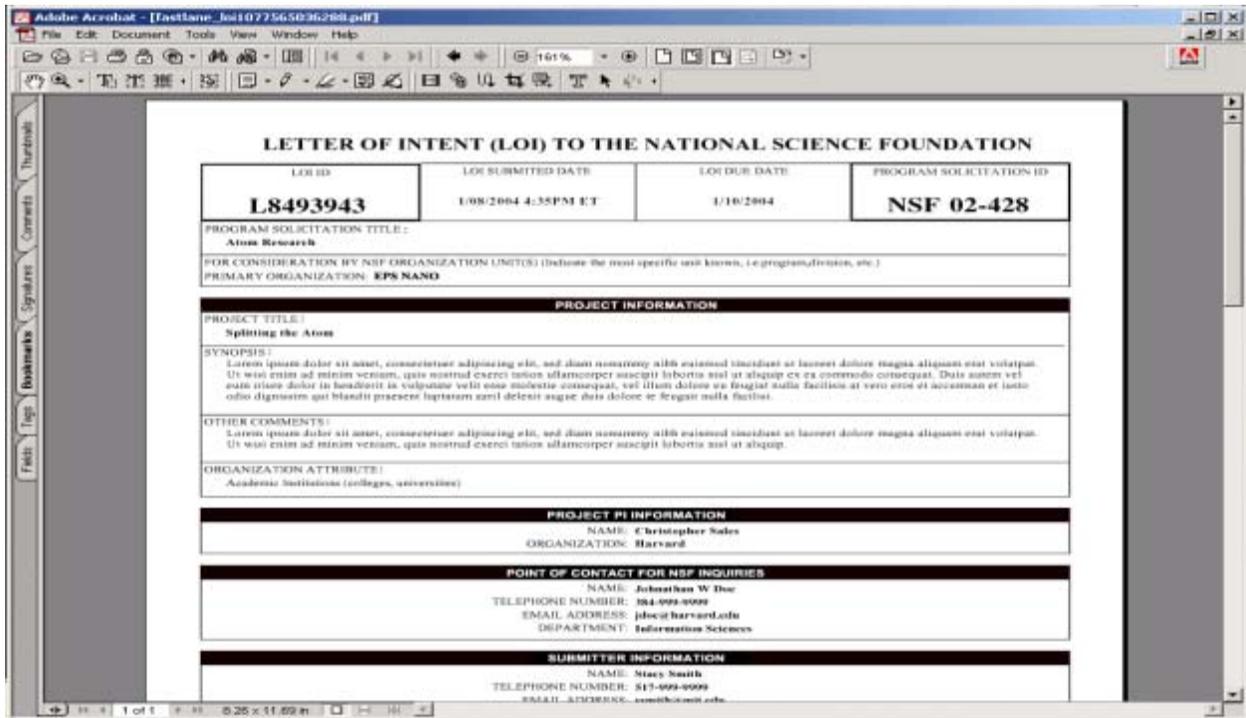


Figure 23. LOI PDF Page

- To view a HTML version of a LOI, click on the LOI ID link of an LOI you wish to view (circled in Figure 24).

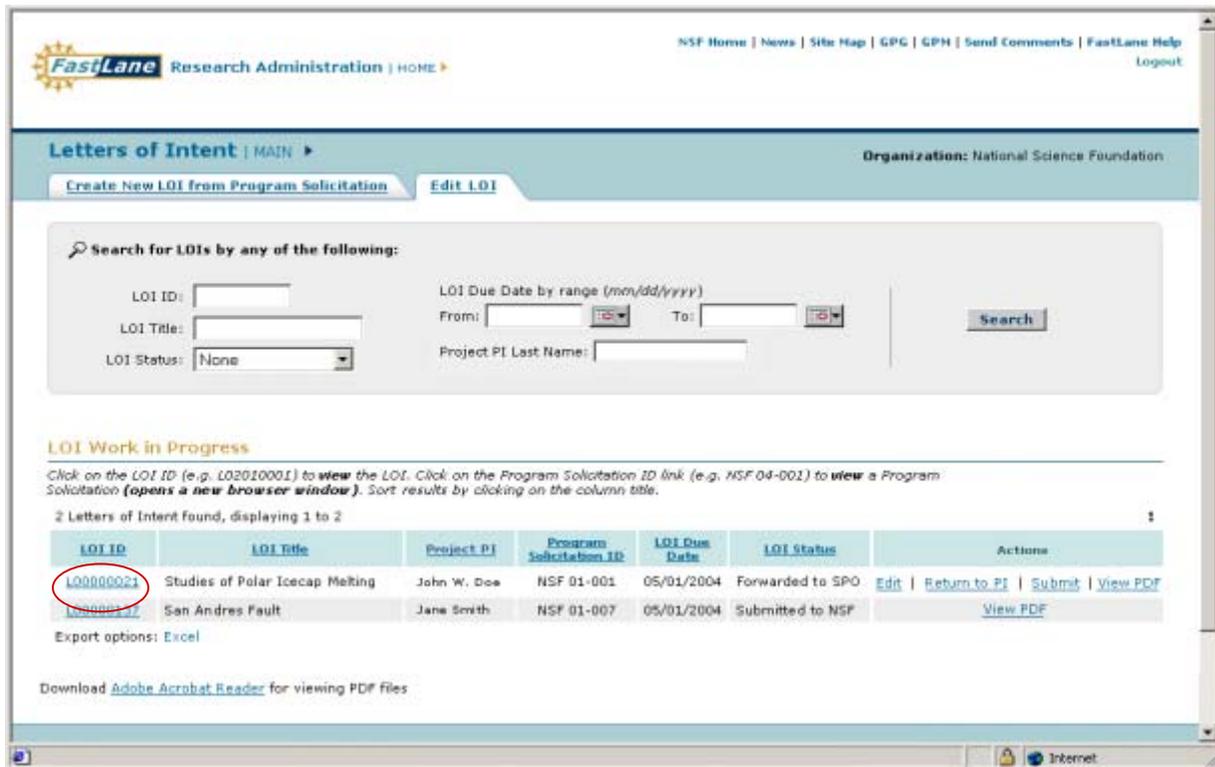


Figure 24. Edit LOI List Page

4. A HTML version of the LOI will appear (Figure 25). This version can be printed from your Internet browser.

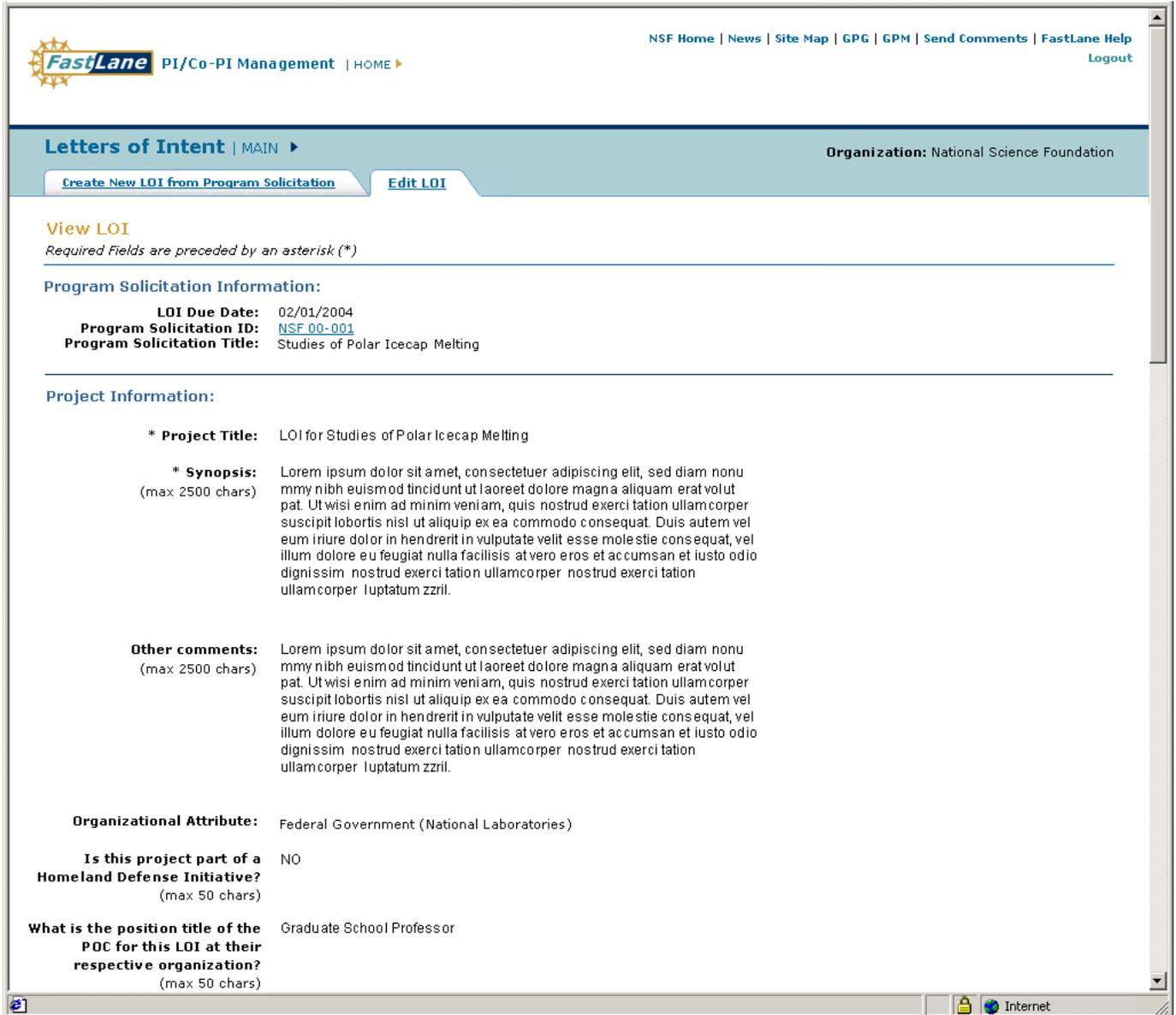


Figure 25. View LOI Page (HTML)

## Delete a LOI

A PI can only delete LOIs that he or she created, even if it has been forwarded to the SPO. A PI cannot delete a created LOI submitted to NSF by either himself/herself or by the SPO. To delete an LOI, complete the following steps:

1. On the *Edit LOI List Page*, click on **Delete** (circled in Figure 26).

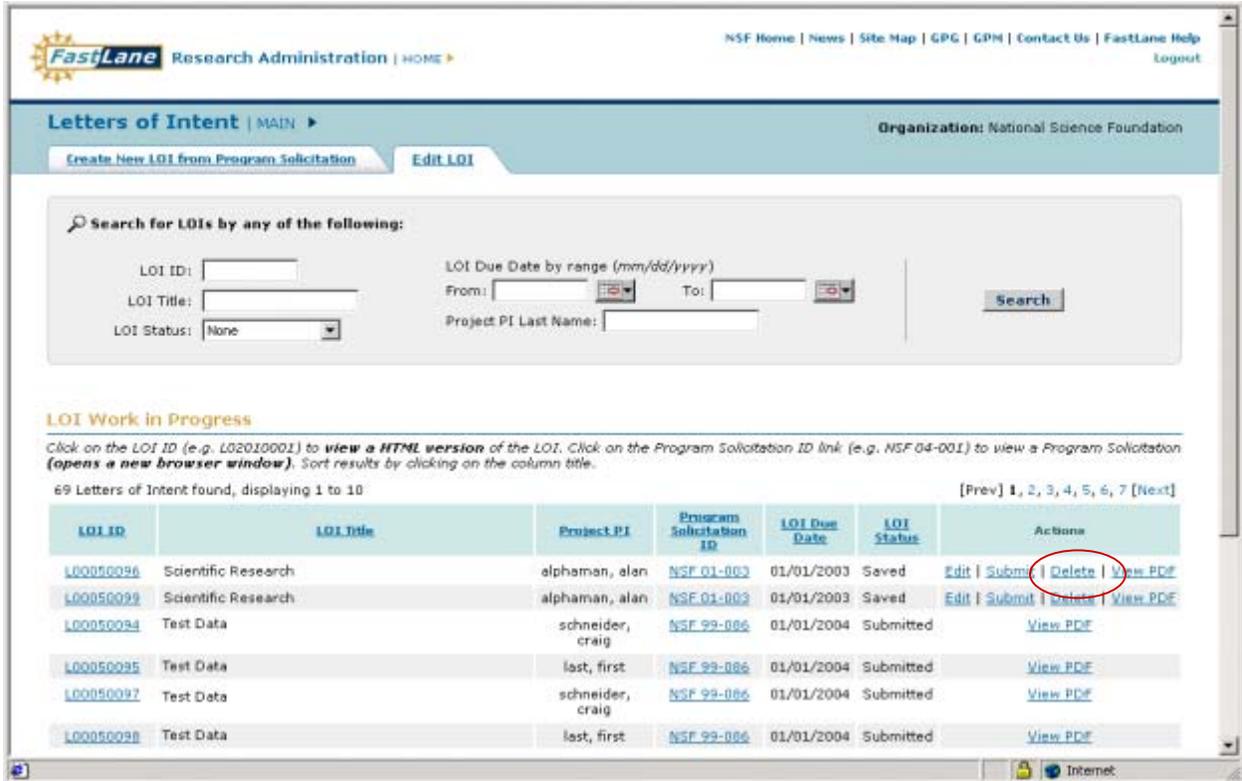


Figure 26. Edit LOI List Page

2. A *Delete Are You Sure Page* (Figure 27) will appear and ask if you wish to continue with your decision. Click **Delete** to delete the LOI and return to the *Edit LOI List Page* (Figure 26). Click **Cancel** to return to the *Edit LOI List Page* (Figure 26).

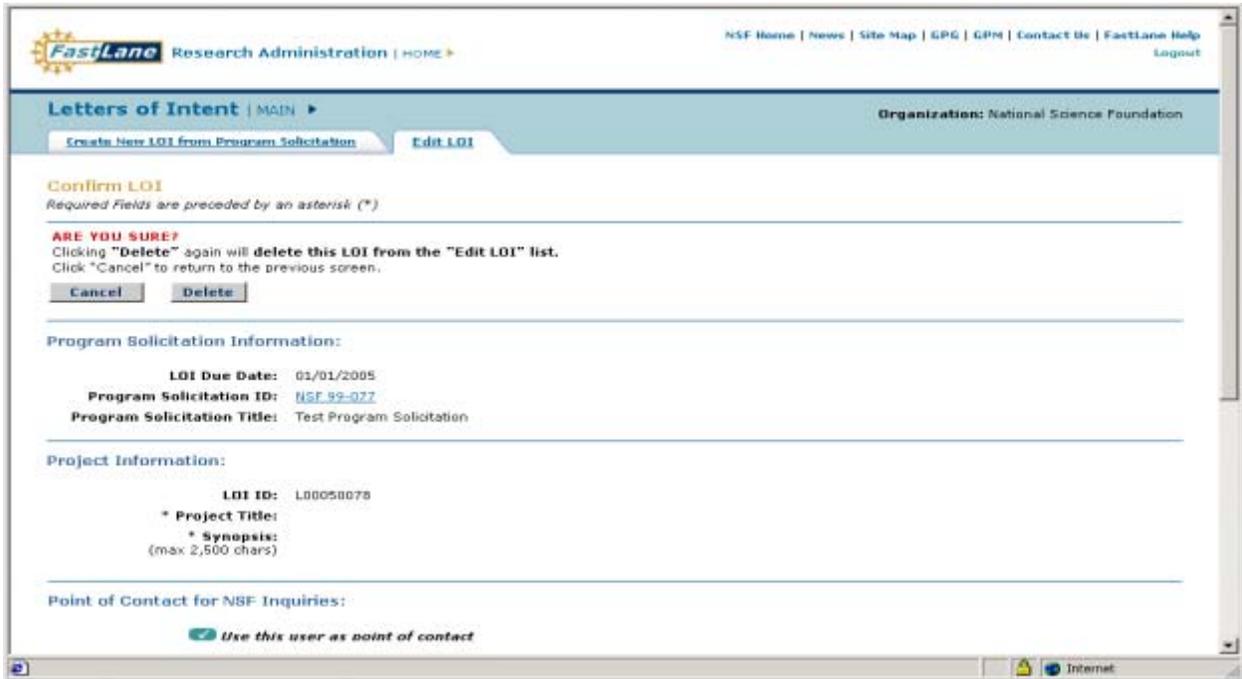


Figure 27. Delete Are You Sure Page

## Edit a LOI

A PI can edit either a created LOI or a LOI they have forwarded to the SPO. They cannot edit a LOI that they have submitted to NSF or by the SPO. Complete the following instructions to edit an LOI:

1. Click **Edit** (circled in Figure 28) on the *Edit LOI List Page*.

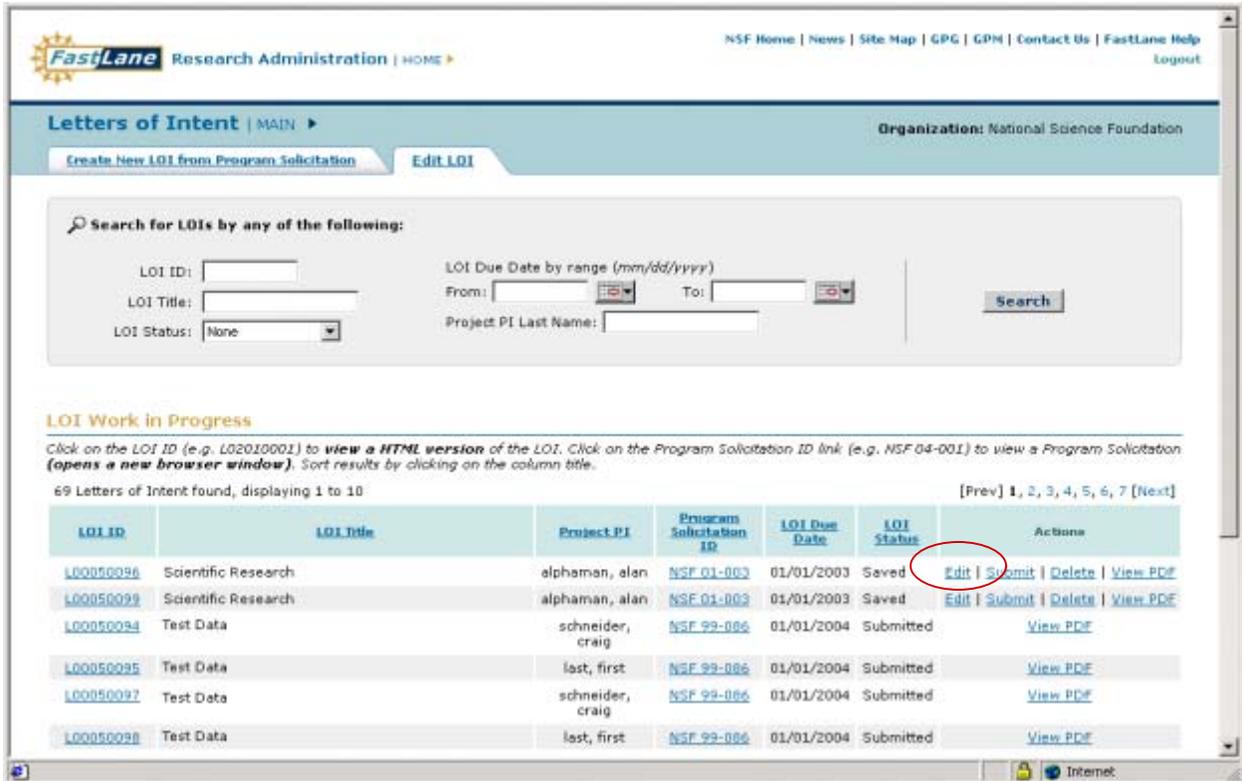


Figure 28. Edit LOI List Page

2. The *Edit LOI Page* (Figure 29) will appear.

The screenshot displays the 'Edit LOI' page within the Research Administration system. The page header includes the 'FastLane' logo and navigation links such as 'NSF Home', 'News', 'Site Map', 'GPC', 'GPH', 'Send Comments', 'FastLane Help', and 'Logout'. The main navigation bar shows 'Letters of Intent | MAIN' and 'Organization: National Science Foundation'. Below this, there are buttons for 'Create New LOI from Program Solicitation' and 'Edit LOI'. The 'Edit LOI' section includes a sub-header and a note: 'Required Fields are preceded by an asterisk (\*)'. The form contains the following fields:

- LOI ID:** L00000021
- LOI Due Date:** 02/01/2004
- Program Solicitation ID:** [NSF 00-001](#)
- Program Solicitation Title:** Studies of Polar Icecap Melting
- Project Information:**
  - \* Project Title:** LOI for Studies of Polar Icecap Melting
  - \* Synopsis:** (max 2500 chars) Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat. Duis autea vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu odio dignissim qui blandit praesent luptatum zzril.
  - Other comments:** (max 2500 chars) Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat. Duis autea vel eum iriure dolor in hendrerit in vulputate feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril.
- Organizational Attribute:** Federal Government (National Laboratories)
- Is this project part of a Homeland Defense Initiative?** (max 50 chars) NO
- What is the position title of the POC for this LOI at their respective organization?** (max 50 chars) Graduate School Professor
- If the POC is at a university, what is their area of study?** (max 50 chars) Oceanography

Figure 29. Edit LOI Page

3. The same text boxes and fields exist when editing an LOI. However, required text entry fields will already be pre-populated. These pre-populated fields can be modified at any time as long as the LOI has not been submitted to NSF:

- i. Project Title
- ii. Synopsis
- iii. Other Comments
- iv. Organization Attributes
- v. Point of Contact for NSF Inquiries Name
- vi. Point of Contact for NSF Inquiries Telephone Number

- vii. Point of Contact for NSF Inquiries Email Address
- viii. Point of Contact for NSF Inquiries Department
- ix. Project PI Name
- x. Project PI Organization
- xi. Primary / Secondary / Tertiary Division (cross directorate – multidisciplinary LOI only)
- xii. Answers to Program Solicitation Questions (if applicable)
- xiii. Other Senior Project Personnel (if applicable)
- xiv. Participating Organizations (if applicable)

4. Click **Save** to retain all changes. The *Edit LOI List Page* (Figure 28) will appear.

Or

Click **Cancel** to end the LOI creation or edit. The *Edit LOI List Page* (Figure 28) will appear.

Or

Click **Submit** to submit the LOI to NSF (applicable when the Program Solicitation allows for the PI to submit the LOI directly to NSF). Go to Submit a LOI Section on Page 11a –15 of the User Guide.

Or

Click **Forward to SPO** to send the completed LOI to the SPO for review (applicable when the Program Solicitation requires that a PI forward the LOI to a SPO). Go to the Forward a LOI Section on Page 11a-12 of the User Guide.